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A KEY TO THE SPECIES OF OAKS OF EASTERN NORTH AMERICA BASED ON FOLIAGE AND TWIG CHARACTERS

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THERE is at present no adequate means for the identification of oaks by their leaves alone, without information concerning the fruit, twigs, bark, and other characteristics not ordinarily available on herbarium specimens. Since poor herbarium specimens and other more or less fragmentary material are constantly coming in for identification it was thought desirable to determine whether a practical key could be devised based on leaf characters only. After much detailed study of all of the various characters connected with the oak leaves such as the type, size, branching, spread, color, abundance, and distribution of the hairs, shape, size, thickness, and color of the leaf, size and shape of the upper epidermal cells, venation on the upper surface of the leaf, the distal angle between the principal veins and the midrib, and the length of the petiole, and after many trials, the appended key was prepared, which on testing has seemed to meet our needs. It is hoped that it may be of use to others faced with similar problems of identification.

The key was intended to include all the species and varities of oaks occurring east of the Mississippi River but owing to a lack of material Q. microcarpa Small and Q. succulenta Small were finally omitted.

The material forming the basis of this study was that in the herbarium of Cornell University and some sent in by botanists from various sections of the area covered. After the first draft of the key was made the material at the Gray Herbarium, the Arnold Arboretum, the New York Botanical Garden, the Field Museum, the

University of Minnesota, and the University of Michigan was examined as a check to the results previously obtained.

To render the key more easily usable a few explanatory notes are perhaps in order. Special attention should be called to the two fundamental types of hairs found on oak leaves. The most conspicuous is a non-glandular commonly branched type distributed over the surface of the leaf or confined to the veins or vein axils. This type itself falls into two subtypes, depending on the way in which the branches spread from the hair axis as to whether these branches spread all at one point or above one another. In addition to this non-glandular type there is generally another kind which is usually more minute and less conspicuous. These hairs are generally appressed or occasionally looser, and are usually of a distinctly stellate structure though rarely simple. The cell walls in these hairs are irregular and give a viscid impression as viewed under the microscope though there is little evidence of actual viscosity as indicated by debris attached to them. They have been designated "glandular hairs" by other authors and the term is retained, but they should not be confused with the capitate type of glandular hairs to which the term is usually applied.

While many features of the various hairs may be seen by inspecting the leaf with a hand lens or low power microscope, for accurate study it is desirable to remove some of the hairs to a glass slide where they may be teased apart, covered with a cover glass and observed under higher magnification. For measuring the spread of the hair branches an eye-piece micrometer was used. For measuring the thickness of the leaves a cover-glass micrometer was employed.

1. Non-glandular hairs entirely absent from both surfaces of the leaf when mature. (A form of *Q. lyrata* is entirely glabrous except for a few non-glandular and almost simple hairs scattered along the midrib and veins beneath.)...2.

2. Upper epidermal cells markedly elongated over the smaller veinlets; apex and lobes of leaves rounded or notched, without bristle tips....3.

3. Base of leaf rounded or cuneate...4.

4. Leaves entire or shallowly 3-13-lobed with the sinuses less than ½ of the way to the midrib, or 3-lobed with the sinuses about ½ of the way to the midrib....5.

¹ Engelmann, George. About the Oaks of the United States. Trans. St. Louis Acad. Sci. 3: 372–400. 1868–77 (Repr. "Botanical Works," Ed. Wm. Trelease and Asa Gray. 1887).

5. The leaves 3-13-lobed with sinuses one third or more of the way to the midrib or rarely entire.
5. The leaves entire or shallowly 3-5-lobed with the
sinuses less than one third of the way to the mid-
rib
2. Upper epidermal cells slightly elongated or isodiametric
over the smaller veinlets; apex of leaf acute and usually bristle-tipped
1. Non-glandular hairs present on one or both surfaces of the
leaf though often confined to the veins or even vein axils6.
6. Leaves with non-glandular hairs distributed over the lower
surface or scattered along the midrib and principal veins,
rarely in conspicuous tufts in the axils of the veins and
then the lower surface densely pubescent7. 7. Branches of the non-glandular hairs spreading at the
same distance from the surface of the leaf, the hairs
loose or appressed; leaves usually without bristle
tips8. White Oaks (except No. 26).
8. Non-glandular hairs sessile or very nearly so, appressed
or loose 9.
9. Leaves entire or shallowly lobed with the sinuses
usually less than one third of the way to the mid-
rib. (Sometimes deeply 3-lobed near the middle in No. 3.)10.
10. Upper epidermal cells markedly elongated over
the smaller veinlets11.
11. Margin of leaves entire or shallowly 3-5-lobed12.
12. The leaves yellowish or grayish brown be-
neath; glandular hairs usually present;
non-glandular hairs scattered over the
upper surface or sometimes only on the midrib; glandular and non-glandular hairs
present on the petiole13.
13. Petioles more than 5 mm. long; leaves
shallowly 3-5-lobed; twigs scurfy pu-
bescent
21. Q. stellata Wang., var. Boyntonii (Beadle) Sarg.
13. Petioles usually less than 5 mm. long; leaves entire or shallowly 3-lobed to-
ward the apex; twigs nearly smooth
12. The leaves silvery white or pale green be-
neath; glandular hairs absent; upper
surface glabrous or sometimes a few non-
glandular hairs near the base of the mid- rib; petioles glabrous or sometimes with a
few non-glandular hairs14.
14. Leaves silvery white and densely pu-
bescent beneath, or pale green with non-
glandular hairs scattered over the entire
lower surface; leaves entire or but
slightly lobed at the apex 4. Q. Durandii Buckl. 14. Leaves pale green beneath, with non-
glandular hairs scattered along the mid-
rib and veins beneath; leaves shallowly
3-5-lobed
11. Margin of leaves coarsely serrate, deeply
sinuate-dentate, or crenate-serrate15.

15. Non-glandular hairs on the lower surface of the leaf of two sizes mixed (the larger loose, 2–8-branched with a spread of 0.40–0.60 mm., the smaller appressed, (2)–4–8-branched with a spread of 0.15–0.30 mm.); or all large, loose, and 8–15-branched with a spread of 0.20–0.40 mm....16.

16. Non-glandular hairs on the lower surface of the leaf gray; some of the principal veins ending in the sinuses.....7. Q. bicolor Willd.

16. Non-glandular hairs on the lower surface of the leaf of two colors, small ones gray and the larger ones yellow; principal veins ending in the lobes......

.....12. Q. prinoides Willd., var. rufescens Rehder.

15. Non-glandular hairs on the lower surface of the leaf all of about the same size, small, appressed; or if larger, then loose with a spread of 0.20–0.40 mm. and simple or 2–4–(5)-branched....17.

17. Leaves with a pair of sinuses about the middle or below wider and deeper than the others; some of the principal veins

often ending in the sinuses. 18. Q. macrocarpa (form)

17. Leaves with sinuses essentially uniform; principal veins ending in the lobes....18.

18. Non-glandular hairs on the lower surface of the leaf a mixture of simple, 2

Spread of the non-glan

19. Spread of the non-glandular hairs on the lower surface of the leaf 0.20– 0.40 mm., loose; lower surface of

18. Non-glandular hairs on the lower surface of the leaf a mixture of 4–12-branched appressed hairs with a spread of usually less than 0.20 mm....20.

20. Leaves with 8-13 teeth on each side (sometimes small leaves with 6 teeth on each side on the same twig with the large leaves); teeth usually

20. Leaves with 5-8 teeth on each side,

teeth usually obtuse 11. Q. prinoides Willd.

10. Upper epidermal cells not markedly elongated over the smaller veinlets 21.

21. Non-glandular hairs on the lower surface of the leaf loose, with a spread of 0.20-0.40

mm.; leaves strongly reticulate-venulose on
the lower surface
21. Non-glandular hairs on the lower surface of the
leaf appressed, with a spread of 0.10-0.20
mm.; leaves less strongly reticulate-venu-
lose on the lower surface. (Larger and
broader leaves somewhat more reticulate.)22.
22. Leaves usually entire
22. Leaves repand-dentate or the upper ones sometimes entire
15. Q. virginiana Mill., var. dentata (Chapm.) Sarg.
9. Leaves lobed with the sinuses more than one third
of the way to the midrib. (If 3-lobed, the lobes
above the middle.)23.
23. Base of leaf auricled
23. Base of leaf rounded or cuneate24.
24. Petiole pubescent, usually scurfy; non-glandu- lar hairs on the petiole a mixture of 4–8-
branched hairs25.
25. Non-glandular hairs on the lower surface of
the leaf of two sizes mixed (the larger
loose, 2-8-branched with a spread of
0.30-0.60 mm., the smaller appressed,
4-8-branched with a spread of 0.15-0.30
mm.)
the leaf all of about the same size26.
26. Leaves silvery white beneath with appres-
sed non-glandular hairs dense, or
scattered over the entire surface;
glandular hairs absent or inconspicu- ous; more than three pairs of principal
veins ending in the lobes, others ending
in the sinuses 16. Q. macrocarpa Michx. and
17. var. olivaeformis (Michx. f.) Gray.
26. Leaves tawny beneath with loose non-
glandular hairs scattered along the
midrib and veins; glandular hairs usu- ally dense beneath giving a yellowish
appearance to the surface of the leaf;
only two or three pairs of principal
veins ending in the lobes27.
27. Leaves with 5–(7) diverging lobes, the
base short-cuneate or rounded
27. Leaves with 3 ascending lobes, the base
long-cuneate
20. Q. stellata Wang., var. paludosa Sarg.
24. Petiole usually glabrous, sometimes with a
few simple or 2-branched non-glandular
hairs28.
28. Leaves with glandular hairs absent on the
lower surface 29. 29. Lower surface of leaf silvery white; non-
glandular hairs usually dense on the
lower surface of the leaf
29. Lower surface of leaf pale green; non-
glandular hairs scattered over the
lower surface or only on the midrib and
veins

28. Leaves with minute appressed glandular
hairs scattered over the lower surface 2. Q. alba L.
8. Non-glandular hairs distinctly pedicellate (pedicel 4
or more times the width of the hair branch), loose30.
30. Leaves 3–8-lobed31.
31. Non-glandular hairs on the lower surface of the leaf all cream colored
24. Q. stellata Wang., var. Margaretta (Ashe) Sarg.
31. Non-glandular hairs along the midrib and veins
beneath yellowish, others cream colored
30. Leaves entire except on vigorous shoots, then
toothed32.
32. Leaves 0.18-0.35 mm. thick with strongly
revolute margins and without bristle tips;
non-glandular hairs on the lower surface of the leaf of two sizes mixed (the larger, loose,
the smaller, appressed)
14. Q. virginiana Mill., var. geminata (Small) Sarg.
32. Leaves 0.07-0.14 mm. thick, without revolute
margins, and with bristle tips; non-glandular
hairs on the lower surface of the leaf all of
about the same size, usually with a very long
pedicel
ent distances from the surface of the leaf (the upper-
most often forming a whorl, the internodes often
suppressed giving a "burr-like" appearance to the
hair); leaves usually with bristle tips33. Black Oaks.
33. Leaves entire or slightly lobed on vigorous shoots34.
34. Ultimate veinlets raised on the upper surface of the
leaf; leaves with 9-13 or more pairs of principal
veins; tufts of hairs absent in the axils of the veins
beneath
the leaf; leaves with 6-9 pairs of principal veins;
tufts of brownish hairs sometimes present in the
axils of the veins beneath
33. Leaves lobed 35.
35. Lower surface of leaf usually densely tomentose;
glandular hairs when present more or less hidden among the non-glandular hairs36.
36. Leaves 3–7 (usually 3–5)-lobed the sinuses
broad and shallow37.
37. Lower surface of leaf canescent, base cuneate.
37. Lower surface of leaf tawny, base usually
rounded
36. Leaves 3–11 (usually 5–11)-lobed the sinuses
broad and deep38. 38. Leaves with terminal lobe much elongated and
all of the lobes more or less falcate; usually
tawny beneath
38. Leaves with all of the lobes about equal, usu-
ally not falcate, canescent beneath
25 T
35. Leaves with scattered pubescence beneath; ap-
pressed amber-colored glandular hairs usually
present beneath and conspicuous, either over the entire lower surface or along the midrib and
veins
to the first the state of the s

6. Leaves with non-glandular hairs in tufts which are in the
o. Deaves with hon-grandular hairs in turts which are in the
axils of some or all of the primary veins beneath or ex-
tending along the midrib and in some species also scat-
tered over the lower surface. (In some species the tufts
are very small, consisting of only a few hairs in some of
the primary vein axils.)
40. Loomog morkodly dileted upword wereller with heim
40. Leaves markedly dilated upward, usually with hairy petioles41.
41. Lower surface of leaf yellow-brown or conspicu-
ought vellow groop country with approard
ously yellow-green, scurfy with appressed
branched amber-colored glandular hairs; leaves sometimes shallowy 3–5-lobed; base of leaf nar-
rowly rounded or cordete 24 O manilandian Manal
rowly rounded or cordate34. Q. marilandica Muench. 41. Lower surface of leaf pale-green but not conspicu-
ously yellow-green; glandular hairs when present
not conspicuous; base of leaf cuneate42.
42. Leaves entire or undulate at the aper. 25. O minus T
42. Leaves entire or undulate at the apex35. Q. nigra L.
42. Leaves 3-lobed at the apex
40. Leaves not markedly dilated upward; petiole usu-
ally glabrous43.
43. Upper epidermal cells markedly elongated over the
ultimate veinlets
43. Upper epidermal cells slightly elongated or iso-
diametric over the ultimate veinlets44.
44. Leaves with cream- to amber-colored glandular
hairs and also sometimes non-glandular hairs
scattered over the lower surface; leaves 2-5
cm. long, oval to oblong-obovate, with strongly
revolute margins
44. Leaves with glandular hairs absent on the lower
surface, non-glandular hairs usually confined
to tufts or sometimes scattered along the sides
of the midrib beneath; leaves 4-13 cm. long,
ovate-lanceolate, elliptic-lanceolate, or rhom-
bic (rarely oblong-obovate), without strongly
revolute margins (slightly revolute in Q .
$laurifolia) \dots 45.$
45. Leaves ovate-lanceolate, sometimes oblong-
obovate with 3-5 coarse teeth toward the
apex, somewhat glossy above and dull be-
neath
45. Leaves elliptic-lanceolate or rhombic, glossy
on both surfaces46.
46. Leaves yellow-green and elliptic-lanceolate
in outline
46. Leaves blue-green and rhombic, sometimes
broadest above the middle
20 Til 1
39. The leaves deeply 3–13-lobed or if shallowly lobed with
5-7 lobes47.
47. Petiole of larger leaves from 0.2–1.5 cm. long48.
48. Leaves with petioles less than 0.5 cm. long
Torres with petiales from 0.5.1.5
48. Leaves with petioles from 0.5-1.5 cm. long49.
49. The leaves 0.12-0.22 mm. thick, usually fal-
cately lobed, and usually very glossy on the upper surface; midrib broad, one millimeter
or more wide at the base, raised on the upper
surface
bullace

49. The leaves 0.07-0.11 mm. thick, the lobes usually nearly or quite straight, glossy above but not conspicuously so; midrib slender, less than one millimeter wide at the base. . 41. Q. georgiana M. A. Curtis.

47. Petiole of larger leaves from 1.5-7.5 cm. long. (Usually 2-7.5 cm. long)....50.

50. Non-glandular hairs in the axils of the veins beneath a mixture of 10-20-branched hairs...51.

51. Principal leaf lobes or some of them with one or two small bristles on the sides of the lobe less than 5 mm. from the apex; lobes rather blunt...52.

52. Leaves with upper principal pair of sinuses narrow and curving forward, all sinuses usually rounded at the base; principal veins, except the lowest pair, nearly or quite straight, ascending or diverging; bud scales

43. Q. Shumardii Buckl., var. Schneckii (Britton) Sarg.

52. Leaves with upper principal pair of sinuses wide and spreading, some of the sinuses truncate at the base; principal veins usually curved, diverging, lowest pair usually more strongly curved; bud scales reddish brown.

51. Principal leaf lobes without small bristles on the sides of the lobe less than 5 mm. from the apex; lobes usually long-tapering . . . 45. Q. Nuttallii E. J. Palmer.

50. Non-glandular hairs in the axils of the veins beneath a mixture of 4-8-(10)-branched hairs...53.

53. Burr-like non-glandular hairs usually scattered over the lower surface or along the midrib in addition to the non-glandular hairs in the tufts in the vein axils; midrib pubescent on the upper surface of the leaf; amber glandular hairs usually present on the lower surface of the leaf, scattered over the surface or only along the midrib and veins; petioles scurfy pubescent all over or only on the upper side, sometimes only near the base, rarely glabrous; buds

53. Burr-like non-glandular hairs usually absent on

the lower surface of the leaf, when present confined to the tufts in the vein axils; midrib usually glabrous on the upper surface of the leaf; glandular hairs absent; petiole usually glabrous, sometimes with a few scattered nonglandular hairs; buds glabrous or only pubescent above the middle....54.

54. Principal lobes of the leaf usually broadest at the base, tapering toward the apex; length of the lobes less than or equalling the width of the broad middle portion of the leaf (rarely one and one half times the middle

47. Q. borealis, var. maxima (Marsh.) Ashe. 54. Principal lobes of the leaf broadest at the apex or with the sides nearly or quite

parallel; the length of the largest lobes two or more times the width of the narrow

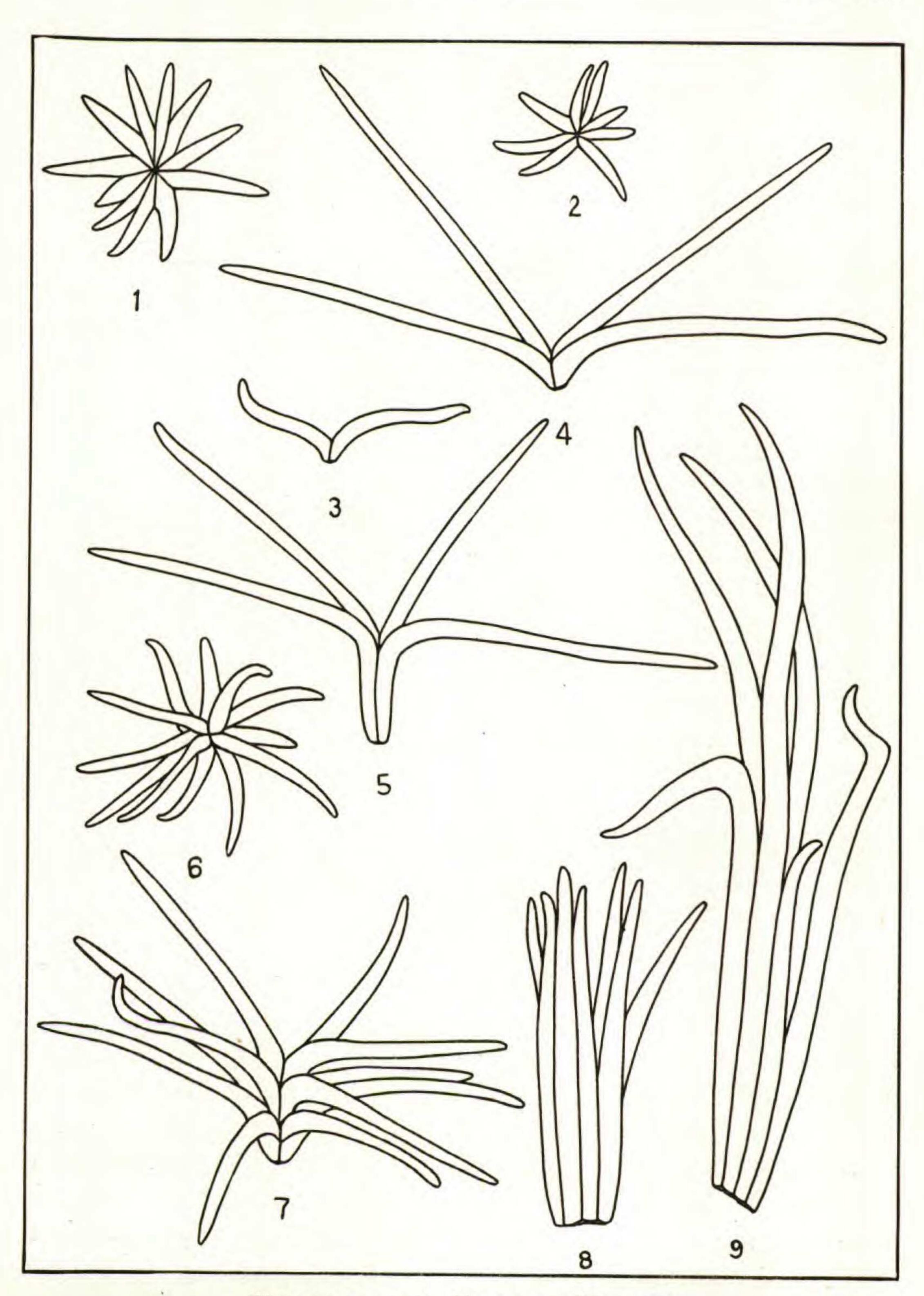
middle portion of the leaf....55.

55. Trees of uplands; winter buds red or orange-brown...56.

- 4. Q. Durandii Buckl. Two forms of this species occur, one with leaves green beneath and the other with leaves white-tomentose on the lower surface. Trelease¹ has considered these as mesophytic and xerophytic forms respectively. Dr. E. J. Palmer states that he has found both leaf forms on the same tree which would indicate that the variations are of little ecological or taxonomic importance.
- 7. Q. BICOLOR Willd. Here, as in Q. Durandii, two leaf types as to pubescence occur, one green and the other white-tomentose beneath. Trelease has considered these as mesophytic and xerophytic forms with the implication that the first one is a woodland form but this point needs further study. This green form has been designated by Trelease as var. mollis Nutt.
- 8. Q. Montana Willd. Q. Prinus L. of most authors (see Sargent, Rhodora, 17, 40, 1915).
- 9. Q. Prinus L. Q. Michauxii Nutt. of most authors (see Sargent, Rhodora, 17, 40, 1915).
- 14. Q. VIRGINIANA Mill., var. GEMINATA (Small) Sarg.² This is recognized as a distinct species by Small and undoubtedly it lies on the border line as to distinctness. The much larger hairs may be added in support of Small's contention, but the general variability of foliage and habit in this species has seemed to indicate the desirability of a conservative point of view at least for the present. A low form with more repand-serrate leaves may be recognized as var. dentata (Chapm.) Sarg. The hairs in this variety resemble those of the typical form but tend to have fewer branches. Other leaf forms have been recognized as distinct varieties by Sargent but are of doubtful taxonomic value.
- 22. Q. LYRATA Walt. As in Q. Durandii and Q. bicolor there is in this species also a green and a whitened leaf form. Whether these are woodland and exposed types as suggested by Trelease should be more fully investigated.

¹ Trelease, Wm. The American Oaks. Mem. Nat. Acad. Sci. 20: 7. 1924.

² Sargent, C. S. Bot. Gaz. 65: 445, 446, 1918.



NON-GLANDULAR HAIRS OF QUERCUS

White Oak Type: fig. 1, Q. virginiana and fig. 2, Q. Muhlenbergii, top view of sessile appressed hair; fig. 3, Q. montana and fig. 4, Q. stellata, side view of sessile hair; fig. 5, Q. imbricaria, side view of pedicellate hair.

Black Oak Type: fig. 6, Q. cinerea, top view; fig. 7, Q. velutina, side view. Vein Axil Type: fig. 8, Q. borealis and fig. 9, Q. velutina, side view.

- 24. Q. STELLATA Wang., var. Margaretta (Ashe) Sarg. This form has been treated variously, as a species, as a variety and as a possible hybrid of Q. alba and Q. stellata. In opposition to the latter interpretation may be mentioned the pedicellate hairs which are sessile in both of the supposed parents, and the absence of glandular hairs which are found on the leaves of both parents. Also there is a denser pubescence on the mature leaves than on either Q. alba or Q. stellata. On the other hand there is little to warrant its recognition as a species. The difference in acorn size emphasized by Small does not seem to exist in our specimens. The variation in leaf shape and in the pedicel of the hair seems scarcely sufficient to constitute a species without other supporting characters.
- 26. Q. IMBRICARIA Michx. This is the only black oak studied having the white oak hair type but it is easily distinguished from the other entire-leaved oaks both black and white by the large pedicellate non-glandular hairs on the lower surface of the leaf.

Three specimens of the so-called Q. Leana Nutt. (one from Biltmore, N. C. and two from Ohio) are at hand. Q. Leana is usually interpreted as a hybrid of Q. velutina and Q. imbricaria. These specimens are interesting from the standpoint of hair types with reference to the supposed parentage. When the leaves are young the upper surface is furnished with the "burr-like" hairs of the black oak group (including Q. velutina) while the hairs of the lower surface are of the imbricaria type. At maturity the upper surface of the leaves has become entirely glabrous but the lower surface is still tomentose with the imbricaria type of hair. These hair types seem to support the supposed hybrid parentage.

- 28. Q. CINEREA Michx. The leaves of this species are often confused with those of Q. virginiana but the hairs are very different and serve as a good means of identification.
- 30. Q. Rubra L. Q. falcata Michx. of many authors (see Sargent, Rhodora, 18: 45, 1916).
- 46. Q. Borealis Michx. f., var. Maxima (Marsh.) Ashe. Q rubra of many authors (see Ashe, Proc. Soc. Am. Foresters, 11:90, 1916). This variety is not separable from the typical form of the species on leaf characters alone.
- 48. Q. ELLIPSOIDALIS E. J. Hill. Owing to the similarity in leaf characters of this species, Q. coccinea, Q. Shumardii, and Q. Shumardii var. Schneckii, it was considered best to separate these species on habitat, bud characters, and distribution.

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